Globalizing and Regionalizing Lifelong Learning – International Organizations' Role in the Diffusion of Lifelong Learning

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Abstract

While the 1970s still knew 'permanent education' (Council of Europe), 'recurrent education' (OECD) and 'lifelong education' (UNESCO), over the past 20 years, 'lifelong learning' has become the single buzz word and catch-all term for reform in above all (pre-)primary, higher and adult education in both national and international education policy making. Both highly industrialized and less industrialized countries embrace the term, in many cases motivated by international and supranational organizations. Yet, literature and empirical investigation on the content of their LLL concepts and their diffusion mechanisms remain scant.

Based on the premises of world polity theory, the paper sheds light on the particular lifelong learning positions in the concepts of the European Union, the World Bank and UNESCO. Particular attention will be given to international organizations as 'theorists' or 'norm catalysts' in applying cognitive diffusion mechanisms.

keywords: *Diffusion ● Lifelong Learning ● Globalization ● International Organizations*

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Introduction: The rise of lifelong learning

The prominence of lifelong learning (LLL) in both political and scholarly debates hides the fact that more often than not its meanings remain obscure. Academia and policy-makers alike are divided over what LLL is to refer to and how it is best to be put into practice. Such disagreement might in part be explained by the imprecise definitions that co-exist, specific cultural, normative and academic backgrounds and a general skepticism towards new fads that – so it is feared by some observers – too easily sweep away old vocabulary.

Understanding the contemporary phenomenon needs a review of its historical background. Some insight will therefore be delivered into early LLL models which emerged in the 1960s and 1970s around international organizations (IOs) like the United Nations Educational, Scientific and Cultural Organisation (UNESCO), the Council of Europe (CE) and the Organisation for Economic Cooperation and Development (OECD).

All three organizations published most of their conceptual contributions during the 1970s (see Table 1) sharing the opinion that the most important target group of LLL reforms ought to be adults. However, while CE and UNESCO saw this new educational concept as ushering in a "new beginning in European educational history" built around a "universally valid educational ideal", an "increase in legitimate freedom" and the help to find "our personal vocation" (CE 1970:5-6) with LLL as "master concept for educational policies" (UNESCO 1972:182), the OECD focused on more concrete questions about how to reconcile labor markets and educational reforms.

Table 1: International Organization and early concepts of lifelong learning

Organization	**LLL concept**	**Key documents**	**LLL approach**
Council of Europe	Permanent Education	*Permanent Education. Future Shape (1970)* *Permanent Education. Fundamentals for an Integrated Educational Policy* (CE 1971) *Final Report (1978)*	Holistic, emancipatory
UNESCO	Lifelong Education	*Learning to be* (1972) *Foundations of Lifelong Education* (1976)	Holistic and emancipatory, but adult-centered
OECD	Recurrent Education	*Recurrent Education – A Strategy for Lifelong Learning* (1973) *Recurrent Education Revisited* (1986)	Labor-related and adult-centered

Inspired by Swedish educational efforts of the late 1960s, the OECD understood *recurrent education* as

> […] a comprehensive educational strategy for all post-compulsory or post-basic education over the total life-span of the individual in a recurring way,

> i.e. in alternation with other activities, principally with work, but also with leisure and retirement“ (OECD 1973: 16)

At the European Education Ministers Meeting in 1975 in Stockholm the OECD proposed a detailed catalog of measures, e.g. the establishment of commissions, educational leaves or the modification of admission to institutions in relevant education sectors (OECD 1975; OECD 1976).

In 1986, the report *Recurrent Education Revisited* identified three crucial questions, which remain relevant until today: (a) the question of participation, (b) how to reconcile labor market structures and recurrent education and (c) how to fund LLL programs and guarantee sustainability (OECD 1986).

The 1986 OECD report also reflects the changed climate in which IOs' policy debates in general took place: overshadowed by the second oil crisis, stricter austerity policies and a general skepticism towards “welfarism”. Hence OECD's sober proposition that in the future LLL should be discussed with “dampened enthusiasm for all-embracing, prophetic reports and greater interest in practical aspects of recurrent education reform” (OECD 1986:5). IOs' work on LLL slowed down in the 1980s and the debate among national policy makers lost much if its momentum concluding with Schuller et al. (2002:8) that these organizations were “ahead of their time”.

This was to change in the 1990s when a “window of opportunity” opened for LLL (Jakobi 2006: 122). What this window opened, was the interplay of three factors: (1) an increase in number and influence of transnational actors (TAs)[1], (2) the omnipresent debate on the globalized knowledge economy and (3) a stronger emphasis on the economic importance of education in political and scholarly debates. Following this argument, it can be stated that since then the old path dependence has been left and LLL as a policy concept diffuses among nation states and TAs. For the latter, it has been said that they are increasingly observable in what Chabbott (2003) calls an “organizational field of international development”, Parreira do Amaral (2011) an “international educational regime” and Mundy (2006) “educational multilateralism”.

However, questions of how this diffusion takes place and what diffuses are still to be explored both theoretically and empirically. It will be argued that a (4) factor can be added that underlies the three mentioned above: the high degree of theorization built into LLL models produced by TAs aiming at turning LLL into a conceptual link between knowledge and economy.

[1] Although this paper mainly deals with international organizations, the term “transnational actor” is preferred over that of “international organization” since the former is broader in scope allowing to include bilateral development agencies, INGOs and consultancies. See Orenstein (2008) for a definition.

The theoretical perspective: diffusion of lifelong learning as a process of theorization

Mainstream research on diffusion has focused on networks, direct interaction and point-to point models of diffusion. Central questions were those about internal factors of adopters (such as socioeconomic status or openness of economy for example) and the (given) "rationality" of adopters in choosing the best option amidst a multitude of alternatives. Indicators are frequencies of contacts and density as well as complexity of networks. This can be said for most scholarship using concepts like *transfer*, *borrowing* and *lending* as well as *learning*.[2] In work on education in general and LLL in particular, similar concepts and methods have been used to explain the emergence and spread of an international educational agenda in both comparative education and other social sciences (e.g. Nagel 2006; Lee et al. 2008; Perreira do Amaral 2011).

It is argued throughout the paper that these approaches, however useful they may be in capturing relevant actors, their relations and activities, miss one important aspect that is both a condition for diffusion (and governance), an instrument in its own right and the substance of diffusion itself. We, instead, highlight *theorization* as a process of *translation* of highly valued, culturally constructed and increasingly globally shared principles that underly the diffusion of educational philosophies, programs and policies.[3]

Drawing upon assumptions from sociological neoinstitutionalism and the sociology of knowledge, we want to explore (1) what diffusion is facilitated by, (2) what role can be attributed to transnational actors in diffusion processes and (3) what diffuses.

(1) Theorization

In a neoinstitutionalist perspective, the rational adoption of a given innovation (be it an idea, a social or technological practice) is only half the story. Departing from the constructivist position of an externally-generated identity, Strang & Meyer (1993: 493) propose *theorization* as the prerequisite and accelerator of diffusion processes.[4] By theorization they mean "[...] a strategy for making sense of the world" through "[...] the self-conscious development and specification of abstract categories and the formulation of patterned relationships such as chains of cause and effect." Those *cultural categories* are

[2] See Steiner-Khamsi (2003) and Perreira do Amaral (2011) for a review on contributions focusing on education and Leisering (2004) for a general assessment.

[3] See Hall (1993) for a similar epistemological distinction.

[4] On several occasions world polity theorists mention theorization as general feature or property of IOs as agentic actors (Strang & Meyer 1993; Meyer et al. 1997). We prefer to treat theorization as a feature and an *instrument*.

filled with the themes and problems that social scientists are constantly surrounded and attracted by: social and personal development, welfare, education and so on. They seem to us as internally consistent and much policy-making that is accompanied by experts strengthen this impression. However, they only suggest their coherence through built-in theories and general *models* (see in a moment).

Theorization not only spells out the cultural category that deserves attention, nor does it confine itself to instill those categories with plausible explanatory models. It also defines *adopters*. Theorization identifies *adopting populations* which supposedly share a similar identity and social practices. They are homogeneous in the *theoretical* perspective and receive their respective script of how to behave appropriately. This said, it becomes evident that diffusion is based on identity-generation and group-definition and that theorization itself is both a condition for and the mechanism by which diffusions takes place.

Theorization itself has become such an ubiquitous instrument as modern societies can be considered cultural projects pursued on the ontological basis of rationalization. Rationalization in this context refers to "the structuring of everyday life within standardized impersonal rules that constitute social organization as a means to collective purpose" (Meyer et al. 1987:29). The collective purpose can easily be found in human rights documents and the international development debates. It is the mythical canon of progress (or development or growth), justice (or equality) based on strong notions of individualism and universalism.

(2) The role of transnational actors

Actors in diffusion processes are often conceived of as senders and receivers. This interaction can take place non-hierarchically between nation-states and hierarchically between nation-states and transnational actors. We consider this question of how they interact as vital, however challenging the methodical hurdles are in empirically corroborating answers.

Further, many research strands (neoinstitutionalists, global social policy researchers or international relations scholarship) treat transnational actors, or more narrowly international organizations, as central and active (sending) actors in diffusion processes labelling them as "cultural brokers" (Trevillion 1991), "norm entrepreneurs" (Finnemore & Sikkink 1999), "interlocutors" (Bellier & Wilson 2000) or "knowledge brokers" (Jakobi 2006). This unanimity is a welcome finding and will be joined in this paper.

Relying on neoinstitutionalist concepts, we regard transnational actors as *agentic actors* that pursue (1)

agency for the self; (2) agency for other actors (individuals and states); (3) agency for nonactor entities (from unborn fetuses to rainforests) and (4) agency for principals.The latter type is most relevant in this context and has already been described above as agency for the globally shared moral goods of progress and justice providing TAs with quasi-religious legitimacy in world society (see below).

In answering the question of how transnational actors transmit their proposals, diffusion research can be roughly subsumed under DiMaggio's and Powell's (1983) classic distinction of diffusion mechanism: regulative, normative and cognitive diffusion. Following the theorization argument touched upon above, *cognitive* diffusion processes will be given further attention.

Transnational actors seem to derive much of their authoritative power from the fact that they accumulate rationalistic and universalistic knowledge within their bodies. This knowledge, in turn, is generated by its highly professionalized and scientific personnel. In numerous publications world polity theorists point to the powerful role of these architects of the world cultural edifice:

> "The new religious elites are the professionals, researchers, scientists, and intellectuals who write secularized and unconditionally universalistic versions of the salvation story, along with the managers, legislators, and policy-makers who believe the story fervently and pursue it relentlessly." (Meyer et al. 1997:174)

It is this combination of being apparently objective and disinterested, operating only on behalf of the world cultural myths of progress and justice together with the scientific and professional models and methods to put them into practice that gives so much credibility and legitimacy to these actors. In this sense, they are the showcase "instruments of shared modernity" (Meyer et al. 1997:164).

Many contributions from governance research emphasize either TAs' regulative or normative power through either legal imposition of institutions and financial leverage or persuasion and moral pressure. We, instead, focus on their cognitive role as *theorists*, *translaters* and *editors* of world cultural blueprints of development. Such an approach does much more justice to the social embededness of actors and their identities and the quality of institutions as social facts and taken-for-granted structures than does a conceptualization of actors around a strategic choice approach.

TAs not only translate modern myths into theoretical accounts (i.e. models; see in a moment), they also *edit* those accounts. Sahlin-Andersson (1996:82) proposes to speak of *editing* by which she designates the "circulation of certain prototypes […] as a continuous editing process in which, in each new setting, a history of earlier experiences is reformulated in the light of present circumstances and visions of the future". Among the primary editors in modern societies she identifies researchers, professionals, leaders, consultants and planners as of paramount importance. In the specific case of IOs, she names

the OECD as one of the chief "international editing organizations" that collects data, processes the information obtained from it and publishes edited and refined reports omitting some and stressing other aspects of a given country data with sometimes lasting effects on political, public and academic discourses (ibid.:84).

(3) The content of diffusion

Where do (policy) ideas come from in the first place? Czarniawska & Joerges (1996) evoke Lyotards (1979) legitimating narratives such as meta-narratives of modernity in the guise of emancipation and progress. Parallels with the world cultural myths that take center stage in world polity thinking are undeniable. Such meta-narratives give rise to meta-ideas that "built a bridge between the passing fashion and a lasting institution" (Czarniawska & Joerges 1996:36). Drawing on world polity thinking, the most inspiring global meta-narratives might be those of rationalization and the capacity to plan and organize human action and social life with modernity being a *project*. Among the meta-ideas are those already mentioned, above all progress and justice. Another meta-idea, closely associated since it is considered a means to the former and can be called one chapter of the meta-narrative, can easily be added: education or rather the acknowledgement that humans can be educated (*Bildbarkeit* and *perfectibilité*).

In our perspective, transnational actors are theorists, translaters and editors of meta-narratives and the meta-ideas therein. Rather than focusing on organizational activities (routines, practices, structures), what actually diffuses are scripts, schemes or logics. What actors (states, organizations, individuals) then do with those ideas, resembles more a process of *translation* than one of simple *mimesis* that eventually leads to *convergence*. Rather than to speak of diffusion as a metaphor borrowed from physical processes (i.e. ideas move from more satiated to less satiated environments), we can rely on Latour's (1993:6) translation describing "displacement, drift, invention, mediation, creation of a new link that did not exist before and modifies in part the two agents".

Further, we want to refer to *traveling ideas* (Czarniawska & Joerges 1996) stressing that an idea moves in time and space, but also through different ontological states: moment and place A sees an idea translated into an object (text, picture, prototype), then translated into an action. In translating, repeating and stabilizing this action, it might finally turn into an institution. The same productive process can occur in place B and at moment B, when a given idea is disembedded from the inceptive environment and send or translated (or reembedded) into another environment.

What facilitates the translation and reembedding, that is, its diffusion and institutionalization, of ideas is both the high degree of abstraction inherent in many traveling ideas and the standardized vocabulary with which these ideas are expressed and translated. As already noted above, this vocabulary is highly theorized in modern societies.

What TAs ultimately do is not simply sending out visionary ideas of education (although they sometimes do just that), they create theorized translations of these ideas in guise of models. Those models contain a good deal of abstraction, simplification, typologies and generalizations about cause and effect chains. They can vary in complexity (from "Eat at least five servings of fruit and vegetables a day" that has become so pervasive in France's public space to the "Solow-Model of development"), but always tend to higher levels of complexity to allow for universal relevance in the specific and related categories.[5]

The observations and assumptions made above concerning the depiction of diffusion as a process of institutionalization through theorization differs from the simple assumption of rational actors picking the best option in order to maximize utility with utility being an objective measure and stable preference of rational actors. Inasmuch as theorization establishes a new logic of appropriateness and taken-for-grantedness, it also constitutes what the best (or rational) choice is. The emphasis on the construction of identity to which TAs make considerable contribution is not to deny the role of other (domestic) variables such as demographic, economic, political and legal ones. They might have their explanatory value in many cases, but there is reason to belief that the underlying processes remain out of scope in these accounts.

For education and LLL, it's diffusion, theorization and the role of TAs as translaters therein, it can be said that studies are less comprehensive and elaborated than in other policy fields such as core social policies and public management. These contributions either make stylized assumptions about what actors want or "deductively" create typologies of LLL without locating these types in TAs' programs or national educational landscapes (Schuetze 2005; Wiesner & Wolter 2005; Schuetze & Casey 2006). Other, case studies, provide ideosyncratic pictures of single actors or sectors (Rivera 1993; Jones 1997; Rutkowski 2007; Schemmann 2007).

[5] Similarly but in a more "rationalistic" vein, DiMaggio (1988: 15) calls those models "public theories" defined as legitimating accounts that organizational entrepreneurs advance" about specific issue areas such as the labor market, the consumer market and so on.

A still slim body of scholarship, however, has begun to reveal the governance effects of theorization efforts by looking at emerging *theorization techniques* such as country comparisons or indicator-based measurement of competences and efficiency in education systems (Nóvoa & Dejong-Lambert 2003; Martens 2007). At the same time, a mostly non-Western literature has emerged pointing to the conflicts that ignite when universal theories meet local realities (Leach & Little 1999) and from within neoinstitutionalist research itself come works that empirically challenge the powerful narratives of the putative effects of education on economic growth (Ramirez et al. 2006).

Data and analysis

In order to investigate TAs' activities and particularly their role as theorists, translaters and editors, we use Grounded Theory Methodology (GTM). GTM (Glaser & Strauss 1998; Corbin & Strauss 2008) can be considered most appropriate in the context of our research questions for two reasons: (1) it has been developed to reveal conceptual and theoretical material that undergirds actors' articulations (in whatever guise) and (2) its methodological roots are in sociology of knowledge and action theory (especially symbolic interactionism). Despite the macro-focus in world polity thinking, actors are conceived of as both reflecting and enforcing cultural construction through their actions.[6] Analyzing these actions can then be seen as taking stock of the furniture in the world cultural edifice (in an ethnographical sense) and as retracing cultural construction processes (in a social theoretical sense).

For this purpose, theorized depictions of LLL models have been analyzed based on a general coding paradigm informed by neoinstitutionalist core ideas that provide helpful theoretical sensitivity. LLL models shall be examined with regard to their (a) *universality* in spatial, temporal and socioeconomic terms and in terms of actor levels comprising states, organizations and individuals; (b) its *rationality* in modeling the role of LLL in mainly means-ends relationships within nation-states (national education systems), organizations and the individual life-course and (c) its *structurality* (or potential for *structuration*), that is, the internal complexity of models reflected in interdependencies between abstracted assumptions in guise of conditions for, causes, consequences, contexts, and contents of LLL. A high degree of structurality – we assume – entails high potential for structuration of national, organizational and individual actors' identities and action through "increased capabilities, rights, duties, and obligations" (Meyer et al. 1997:634).

The following results do not represent a final statement as analysis is still going on. The choice of

[6] Note, for instance, that such neoinstitutionalist concepts as *actorhood* or *personhood* are not only at the heart of the theoretical corpus, they are genuine conceptual innovations in social theory debates introduced by neoinstitutionalists.

organizations (UNESCO, World Bank, EU) is motivated by the fact that they have produced most of the theoretical material on LLL so far and have been considered first in our own analysis for methodological reasons. However, the focus on the EU shall be supplemented with a particular emphasis on its aid agenda represented by EuropeAid in order to widen the scope to a more underresearched actor.

UNESCO: lifelong learning with a "human face" or knowledge for society

Universality

In the much-cited Delors-Report (UNESCO 1996:111), LLL is considered the "key that gives access to the twenty-first century". Four years later the World Education Forum (2000:12) was sure of the fact that "Starting from early childhood and extending throughout life, the learners of the twenty-first century will require access to high quality education". On many occasions, learning and education is taken for granted as an universal activity across the globe including poor and rich countries, across the life-span (virtually from birth to the cradle) and across learning sites (from informal to formal). Free education is promoted, at least at the primary or basic education level (UNESCO 2000; 2005). Universality of learning is also included in UNESCO's (2000:64) definition of LLL being "itself a cyclical, episodic and continuous concept that involves both intended and unanticipated episodes of learning of both informal and formal nature."

Rationality

Long ago the time when education was to be pursued for its own sake in UNESCO's philosophy. The aforementioned "intended and unanticipated" episodes of informal and formal nature are now to be harnessed for various purposes. Translated into the project mode, LLL objectives revolve around justice (in guise of empowerment of marginalized groups) and access to labor markets or "self-employment opportunities" (UNESCO 2010:2).

The curriculum that is to equip learners with these capabilities consists of technical and entrepreneurial skills including internships, "life skills" that are built on critical thinking, problem-solving and risk-taking, gender issues and reproductive health. At the same time, the "importance of valuing the learners' experiences in order to create both the curriculum and opportunities for learning is paramount: education from all as well as for all" (UNESCO 2000: 64). The holistic approach that is envisioned in UNESCO documents entails the educationalization and "curricularization" of the most private and

intimate areas always implying that this intervention leads to a better future for individuals and societies.

Structurality

Structurality in UNESCO's LLL model is reflected in its complex bundle of interdependent categories in guise of the LLL objectives as already shown above. Here, structuration of nation-states is entailed as national policy makers are expected to internalize these objectives into their national agenda. Similarly, educational institutions – now putative LLL institutions – are cautioned to facilitate, guarantee and provide access to LLL opportunities. Most clearly, however, these objectives work on individual life-courses. People are now offered a "second or third chance, satisfying their desire for knowledge and beauty or their desire to surpass themselves" (UNESCO 1996:111). UNESCO believes that learning "builds self-confidence, citizenship and autonomy" (UNESCO 2000:64) and "[...] is central to individual empowerment, the elimination of poverty at household and community level, and broader social and economic development." (ibid.:18).

Another source for future structuration of relevant actors will come from the new LLL architecture (see Annex I). Here, questions about legislation, ownership, standardization of competences within national qualification frameworks and the interdependence of educational sectors, levels and curricula are knit together entailing huge potential for jurisdictional reforms, the acquisition of new authorities, competencies, and the interdependence of a network of state agencies, business associations like chambers of commerce, labor unions, employers and educational providers. Actor identities are likely to become re-written and divisions of labor reshuffled.

National governments are encouraged to formalize non-formally and informally acquired knowledge and to de-centralize education to non-formal arrangements. Recognition shall be based on national qualification frameworks and educational levels shall "seamlessly" be weaved together. However, this picture is still undercomplex as based on a single paper (UNESCO 2010) in a South-South context. It becomes much more elaborate when UNESCO's recommendations for other contexts are added.

Keeping the focus on development and LLL, the picture becomes even more complex if looked at how many actors are involved in LLL projects. In many cases, more than 15 different actors on all levels and of all kinds are supposed to work together. These include national, regional and local government authorities, local and international NGOs, IOs (global and regional), bilateral development agencies, local business associations, ethnic minorities' representatives, community training centers, school

representatives and other often not specified “consultancies” and “private providers” (ibid.:8).

In these top-down approaches, learners as adopters are very precisely defined in demographic (adults, young, people, girls, young women), socioeconomic (early school leaver, informal economy workers, unemployed, underemployed, rural communities) and other categories such as people with special needs, migrants, ethnic minorities or more general “marginalized groups” (ibid.:16).

Not less structured is the theorization of LLL contents in guise of numerous “competences” that are seen as skills, knowledge, values and attitudes at once (UNESCO 2008). Not less than 18 competences make for four competence bundles (personal, learning to learn, ethical and social); (Annex II). If these are seen as learning outcomes and expected consequences of a LLL curriculum, it does not take much to interpret them as imperatives for curriculum reform, overhaul of teacher training, new didactic approaches, a changed understanding of teacher-student-interaction and more generally a new understanding of education *per se*.

Structuration for organizational actors such as schools and ministries and teacher training colleges is vast. Individuals are targeted, too. Teachers, students and families are then expected to strengthen such values and attitudes. Most revealing are the personal competences since they reflect a highly individualistic concept of personality so deeply anchored in Western societies and often very incompatible when transferred to non-Western cultures (Zapp & Rezapour 2010).

The World Bank: from laborforce to “learnforce” or knowledge for economy

Universality

The WB can be called a new actor in promoting education and particularly LLL as it was not among the fore-runners of early conceptualizations before the 1990s. Its current role is, in turn, all the more active. The 2005 report *Lifelong learning in the Global Knowledge Economy* makes the impression the WB wants to catch up and even overtake others by tabling a comprehensive theoretical offer. The report centers on developing and transition countries, but frequently mingles these with OECD experiences with sweeping conclusions like those arguing that LLL in a global knowledge economy is a “necessity for people who want to have high valued-added and secure well-paid jobs” (ibid.:71). WB projects can be found on all continents and across the socioeconomic continuum.[7]

Just like in UNESCO work, the WB sees LLL as a comprehensive solution for all countries alike, for a wide array of learners and across individual's lives as well as education system components. In line

[7] The internal search engine yields lifelong learning projects in 31 countries across the globe (WB 2013).

with EFA goals, universal primary or basic education is to be achieved through public spending since here "social returns exceed private returns" (WB 2005:73).

Universality is also to be enhanced when it comes to define a "universally recognized set of indicators against which all learning can be evaluated" (ibid.:66). And indeed, not long after diagnosing this lack, the UNESCO, OECD and the EU have started to elaborate those tools, which are now applied in numerous countries.

Universality in claims is strengthened to the frequent use of vocabulary from educational economics such as investments, returns, social, cultural and human capital and putative thresholds, opportunity costs and marginal costs merging into an eclectic economic theory of education and development enriched with sociological (originally often *counter*-)concepts.

For example, although evidence is based on a single country experience (Costa Rica), the WB speaks of a "threshold level of human capital accumulation beyond which a country may experience accelerating growth" as of universal applicability showing the "typical" impact of each year of schooling on income only to qualify this statement a few lines below acknowledging that

> "productivity of schooling may be much lower in countries where the government does not promote an environment favorable to the creation of higher-paying jobs and a significant number of educated workers in the public sector" (ibid.:5f.).

The WB must now regret to have prescripted exactly the opposite throughout the 1980s and early 1990s when among the core policy recommendations of its Structural Adjustment Programs was to privatize social public services in welfare, health and education sectors (Bello 1995; Siebold 1995; Todaro 2000).

Rationality

Unsurprisingly, "Lifelong learning is becoming a necessity in many countries" and "Lifelong learning is education for the knowledge economy". Why and how requires a lot of theoretical effort. In order to fit in some arguments theoretically, some terms borrowed from social sciences are boldly redefined. Social capital is suddenly "broadly defined as social cohesion or social ties" (2005:3). Causal relations are taken for granted where only correlations (if at all)[8] can be claimed and sometimes directions of these are simply flipped or become mutually enhancing:

> "Social capital also improves education and health outcomes and child welfare, increases tolerance

[8] As a matter of fact, literature on these effects of education only agrees on the statement that education matters, it cannot say how, why and how long delays of effects are (Ramirez et al. 2006). Intervening variables and other statistical hurdles render it too complex. The WB (2005:6) itself acknowledges it somewhat aware of these shortcomings.

> for gender and racial equity, enhances civil liberty and economic and civic equity, and decreases crime and tax evasion [...]. Education must thus be viewed as fundamental to development, not just because it enhances human capital but because it increases social capital as well." (ibid.)

Another sophisticated, but highly biased cause and effect chain is presented to explain why "Access to learning – and consequently learning achievement – is highly inequitably distributed in all societies" (WB 2005:72f.). Overcoming inequity in access to learning can be achieved through (ibid.):

- "changing the learning process […] enabling more people to achieve the skills they need;
- […] establishing accountability systems that could help learners and their families make informed choices;
- the recognition of informal and non-formal learning;
- gender assessment;
- decentralization"

The framing of the problem is clear: it is institutional inertia and lack of efficiency that restricts the development of individuals' potential. If institutional arrangements are refashioned, LLL can become a reality. Not a single word on the lack of financial resources, externally-distorted labor markets, sociocultural and socioeconomic structures, wider (global) macroeconomic problems or inherent market failures is mentioned. An intriguing example of TAs as highly selective *editors* of information.

Structurality

The WB puts heavy emphasis on comparing the old education system with the new LLL system. Table 3 contrasts the two models according to the WB vision. Taking this overly prototypical comparison at face value, implications are enormous. Education systems have to overhaul their teacher training, their methods, their technical equipment. They have to come up with new flexible solutions to individual learning routes. Learners are conceived of as the main anchor of this new system. They are to be empowered through competencies and they "drive" this new system assuming that they know what they want to learn and need to learn, often not the same. Given that they are presumably working in an economy where "change is so rapid that workers constantly need to acquire new skills" (WB 2005: XVIII), that means that have not only constantly to learn but also constantly to know what to learn.

Table 3: Scope, Content, and Delivery of Education and Training in Traditional and Lifelong Learning Models (WB 2005:58)

Dimension	Traditional model	Lifelong learning model
Scope	Formal schooling from primary to higher education	Learning throughout the lifecycle – in schools, on the job, after retirement
Content	Acquisition and repetition of knowledge	Creation, acquisition, and application of knowledge
	Curriculum driven	Diverse sources of knowledge
		Empowerment of learners
		Competency driven
Delivery	Limited learning options and modalities	Multitude of learning options, settings, and modalities
	Formal institutions	New pedagogical approaches
	Uniform centralized control	Technology-supported delivery
	Supply driven	Pluralistic, flexible decentralized system
		Learner driven

The European Union: Towards a "Third Way" and a "European consensus"?

Universality

In the 2002 *Detailed Work Programme on the Follow-up of the Objectives of Education and Training Systems in Europe* the Council notes that "the development of education and training systems in a lifelong learning and in a worldwide perspective has increasingly been acknowledged as a crucial factor for the future of Europe" (EU 2002b:9). This is to be done applying a "single comprehensive strategy" (ibid.:13) with LLL at its core. Universality can not only be found in the sense of a single strategy for all member countries, but also with regard to the life course and learning settings in that LLL is to comprise the "pre-school age to that of post-retirement, including the entire spectrum of formal, non-formal and informal learning (EU 2002c:6).

Universality is also implied when methodical toolkits become opened helping in the "[..] spreading of good practice and the measurement of progress through agreed instruments, comparing achievements both between European countries and the rest of the world" (EU 2002b:6). These instruments include "indicators and benchmarks as well as comparing best practice, periodic monitoring, evaluation and peer reviewing etc. organised as mutual learning processes" (ibid.:12). Interestingly, comparisons are made between the EU average, the average of the three best EU performers and "the rest of the world" with the rest of the world comprising the USA and Japan.

What happens when the EU applies its regional LLL concept beyond its own boundaries? First, a new vocabulary is to be agreed upon:

> "It has been acknowledged, in line with the recommendations of the Jomtien and Dakar conferences, that basic education requires a specific definition that is no longer overrestrictive or too technical (e.g. the OECD/DAC definition) but can be more broadly applied to all regions and education systems." (EU 2002d: 22).

As part of this effort to redefine basic education, "lifelong" is used as one corner stone along with "technical", "special", "higher" and "tertiary" education (ibid.). Basic education, which can comprise both informal and formal learning from a minimum of three years to a full secondary cycle, is considered propitious to "lay the necessary foundations for embarking on a voyage of lifelong learning" (ibid.).

LLL is being promoted in all world regions in which the EU/ EuropeAid is active: Asia, Africa and Latin America and the Caribbeans. Overall, LLL is to be understood as part of a "[...]whole sector approach, which starts with early childhood development and embraces lifelong learning and strengthens links between education and the world of work [...]" (EuropeAid 2010:26f.).

In detail, EuropeAid support for implementing LLL in the Dominican Republic, for instance, means "[...] education for all - learning and development: equality of opportunities, lifelong "learning to learn", focus on scientific and technical advances;[...]" (ibid.:115). In Bangladesh, LLL is strongly associated with literacy and a focus on the "unreached illiterate and disadvantaged" (ibid.: 158). Again, LLL solutions are to be offered across the educational level, age groups and learning settings. In Botswana, national committments under the LLL umbrella are backed by the EU to provide "[...] ten years of basic education for all, to increase access to senior secondary education and expanding vocational and technical training [...]" (ibid.: 177).

Rationality

Perhaps the most powerful and far-reaching link that has been established in LLL debates is that between learning and employment through "employability". LLL turns out to be the most crucial contributor to "economic growth, innovation, sustainable employability and social cohesion" (EU 2002b:10) inside the "European Educational Space" (see below).

Outside – in the EU's development policy approach – it is supposed to impact "upon the personal development of individuals but it also contributes to the development of society at large. It promotes occupational development for improving earning potential [...]" (EU 2010:159).

More precisely, in the Programming Guidelines for Country Strategy Papers (2006:9) European policy makers are asked to "check whether the partner country's education policies respond to the country's needs".[9] The latter can be examined by asking

> "Has a proper link between the education system and the domestic job market been established, particularly as far as VET and higher education are concerned, but also other aspects such as life-long learning opportunities? Has the country's integration into the global knowledge economy taken into consideration?" (ibid.: 10). "

There is no substantial differences between a within EU rationale for LLL and an outside EU rationale. Changing work realities and social transitions might have contextual variation, but with identical conclusion. While demographic factors might weigh heavier inside the EU than outside, broad social and economic changes are in both cases the underlying causal argumentation.

Structurality

A detailed picture of how development projects serve as a window to structurality in "glocal" governance can be found in Pakistan where EuropeAid is highly active. In the period 2000-2007, 19 organizations of various kinds (multilateral global and regional, banks, bilateral agencies) intervened in the Pakistanese education system across all sectors and levels. Overall, more than $1.5 billion were given in loans and grants, that is, more than $214 million per year.[10] Here, a clear example of "projectisation" shows how strongly national systems are pervaded by a multitude of external actors who supposedly speak a universal language and apply universally valid technologies that re-structure whole systems.

Even curricular questions have received attention when the EU (2002b:18) talks about "improving quality and effectiveness" by defining the "key competencies" for the knowledge economy consisting of mathematics, reading, science, foreign languages, information and communication technologies and learning to learn. While in an earlier statement civics were given somewhat more weight, it has now been replaced by social skills and entrepreneurship (EU 2000). In this sense, the EU is in line with UNESCO and WB recommendations as seen above.

Most direct structuration, however, can be found for EU member states. Frequent references to the

[9] Similar guidelines are given for projects dealing with gender, culture, disabilities etc.

[10] Exact amount is $1.585,953. However exact this sum is, 131 million are debt swaps and three Japanese project numbers are not available. Data taken from EuropeAid & particip GmbH (2010) and aggregated.

unanimity in decision-making among EU member states celebrate “agreed instruments”, “voluntary participation”, “partnerships” and “decentralized approaches” in order to “help Member states develop their own policies progressively” (EU 2002b:12). More critical contributions to this relationship, however, rather evoke analogy with the experiences of the sorcerer's apprentice (Novóa & Dejong-Lambert 2003).

The institutional imperatives in the EU are all the more stronger given its regulative, that is, legislative power and its overall aim to create a single economic and educational space with high mobility, cross-national recognition of standardized knowledge, skills and certification as well as the protection of employers' rights across national labor markets. Against this backdrop, the recent decision to integrate programs for schools, higher education and adult education like Erasmus, Leonardo and Grundtvig into the comprehensive Lifelong Learning Programme makes all the more sense.

In this vein, EU documents on LLL also allow insights into a still young, but telling genealogy that now consists of *employability*, *flexicurity*, *active labor market policies* and, its latest offspring, *lifelong learning*. Describing the labor market as the most relevant mechanism of social inclusion and unemployment as an educational problem in terms of individual “employability” is not only an example of theoretically reframing rationality and relations of work and education systems, it “depoliticizes” the field and threatens to remove a large area – equity, resource allocation, the political economy of public education – from the policy agenda. This implies that the state backs out as a warrant of equality (of opportunities and results) and failure would become individualized. Although learning might only be attributed to people as a human quality, not mandated or secured as in the case of social policy and educational provision and although individual learning is beyond public control, the hitherto unheard-of situation of state-mandated vocational training as a welfare policy has become a reality in many OECD countries.

Conclusion

Organizations promoting LLL have attained a high degree of theorization. The complexity of LLL theorizing has been operationalized through (a) its *universality*; (b) *rationality* and (c) the *structurality* of models. LLL theorization analysis suggests that genuine *models* emerge that overtly claim *universal*, global, cross-cultural validity, independent of a country's socioeconomic development, history, culture and social reality. They are equally linked to different target groups: the employed, unemployed, underemployed, educated and uneducated, majority and minority groups alike.

The latter is linked to the *rationalized* character of LLL. As a theoretical model and practical reality, LLL is considered a means to achieve individual and collective development, intimately attached to the economic relevance of education and placed into individual autonomy as emblematically coined in terms of "self-employment opportunities" and "employability".

LLL models' *structurality* is self-evident if considered that they sometimes designate a "new system" that is to replace the "traditional" one. Structuration is likely to occur for all actors involved in this new system. *National policy makers* are encouraged to incorporate these new goals, overhaul their educational architecture, adjust their curricula and take into account bridging neighbouring policy sectors such as labor market, environment, health and so on. *Educational organizations* are to become pillars of this new system. Part of their script is their prepatory and transitory character since they are only one passage in a lifelong corridor.

Yet, the systemic implications hide the fact that most is expected from *individuals* themselves. Their role and identity is reshaped with potential consequences for the individual life-course and socialization. An ever greater responsibility (one might call it burden) is laid upon their shoulders. Supposed to be filled with the "desire for knowledge" and "a desire to surpass themselves" (UNESCO 1996:111), they only need to be provided with learning opportunities to make most of their lives.

The curricula and the LLL competences undergird this construction of an ever more capable individual that is to become an entrepreneur, risk-taker, problem-solver equipped with personal, social, ethical and learning to learn competencies that penetrate the full spectrum of the theoretical apparatus from development psychologists on levels of skills, knowledge, attitudes and values. Never has the theorization, that is, the construction of individuals been more obviously reflecting individualistic, liberal Western notions of rationality than in these models of lifelong learning. More precisely, notions of a highly educated and scientized middle class. That these construction efforts are highly unrealistic when it comes to actual capabilities and opportunities, does not change their relevance. In redefining responsibilities for success and failure (both individual and collective), they have already been of great worth and will continue do be so.

Some have pointed to the possible fashion-like character of the current LLL debate (Field 2006). We assume, instead, that LLL is currently undergoing a worldwide institutionalization process that is not ephemeral in character and whose theoretized translations are still to be explored. Three arguments can be brought forward to support this assumption:

(1) the fit between LLL as a model and the meta-narratives and meta-ideas of modernity

World culture or the theorists of world culture define education as a means to progress and development and the state as the collective educator as part of a generic and scripted nation-state identity. Looking out for advice on how to behave they can draw on those scripts. Moreover, other actors entrusted with similar scripts expect states to behave accordingly. This interplay between the rationalized others and the reciprocal generation of legitimacy in world society is what creates, maintains, consolidates and perpetuates actors' identities and the action derived from them.

LLL can easily be seen as an extension of the global institutionalization of mass education around the world whose origins are in 19th century Europe. It is a concept that seeks to reach the hitherto unreached defined both in socioeconomic terms (the uneducated, unemployed, underemployed) and demographic terms (from early childhood to post-retirement) and with regard to learning settings (formal, non-formal, informal). It is Jakobi's (2006:115) "functionalistic rationale of the knowledge society" that turns LLL into such an attractive "polygamous" concept. Such a rationale needs, however, above all to be understood as part of the narrative states are to enact.

Implications of LLL can be stretched beyond the nexus of *state* and *learner*, envisioning them in broader terms of *social* and *cultural change*. Scholarship on individualization and the construction of the individual along with its *life-course* as an "orderly project" (Meyer 1986:200) are ample in both neoinstitutionalist and other sociological schools. If we are interested in the "wider cultural and institutional systems in which person and activity are embedded" (Meyer 1988:50), much indicates that a LLL reality would both extend extant systems and create completely new ones, (paradoxically) resulting in more life-course standardization and external identity-formation. Effects of these processes of social and cultural change are strongest in those societies where notions of individuality and society are still different from those of modern societies (e.g. transition and traditional societies). Although still underresearched, LLL is fastly entering both national and international agendas of education policy makers engaged in these world-regions (see next section).

(2) the globality of the phenomenon

Another indicator that might support the judgement about LLL as a lasting insitution is the fact that it has already made its way into the educational agendas of a vast arrray of actors in an increasingly global organizational field of education. Although most contributions on the issue focus on OECD countries and a very neat set of actors, other studies (Jakobi 2006) show that both national actors

(countries) and TAs in non-OECD regions embrace the concept wholeheartedly. The organizational field of education does not only increase in quantity (number of actors) and complexity (type of actors), it also increases in substantial quality in that organizations tend to allocate more and more funds to professionalized expertise and personnel to offer increasingly complex theoretical elaborations on the issue. In general, reviews of TAs' positions on and theories of LLL is almost exclusively pinned to the big five: UNESCO, World Bank, OECD, ILO and EU.[11] Although there is reason to believe that these actors are the most influential "institutional entrepreneurs" (DiMaggio 1988) in this instutionalization process, other global (e.g. IMF, WTO), regional (AU, ASEAN, ECOWAS etc) and national actors (USAID, DFID, GIZ etc) as well as INGOs (labor, business, philantropic) are about to enter the field of education and LLL as our own review shows (Zapp forthcoming).

(3) the degree of theorization

As said before, theorization is at the same time condition, mechanism and content of diffusion. The degree of theorization in educational matters in general and LLL in particular has acquired a new quality. While political statements on LLL made by TAs in the 1970s were overly lofty (they still are sometimes), and policy recommendations often (theoretically) unfounded, pilot-like, inconsistent or simply absent, many actors now make huge efforts to theorize what they consider most apt to turn LLL into a reality. Equipped with professionalized personnel working in specialized units, organizations come up with definitions, benchmarks, best practices, indicators, indeces, quality criteria in order to audit, evaluate, measure, compare and rank countries' performance. The now acquired degree of scientization in the LLL debate might hint to the beginning of a second phase in Jakobi's (2006) paradigmatic shift. From policy emergence to policy theorization with a parallel track of policy formulation and implementation that serves as a laboratory for the concept in practice.

If these tendencies are often researched in an OECD context, beyond it similar tendencies can be observed. Thus, LLL becomes not only a theoretical pivot for knowledge societies, it becomes a pivot in education as a development paradigm. In the development context, policy laboratories can easily be found in guise of projects, for instance. Stubbs (2006:9),[12] in describing the role of consultancies in South East Europe, speaks of "projectisation" in which "various 'technologies', inscriptions, and non-human actors constitute a crucial element in the way consultants produce and re-produce knowledge".

[11] This review cannot be comprehensive. Other notable contributions come from Green (2006), Jarvis (2009) and seminal Jakobi (2006).

[12] I want to thank Paul Stubbs for permission to cite his paper.

A particular focus on LLL projects is, therefore, imperative to understand theorization of LLL in non-OECD countries.

These three qualities of LLL – its "epistemological fit", its globality and its degree of theorization – are likely to accelerate its diffusion, facilitate its adaptation and suggest to assume lasting institutionalization and the formation of a new path dependence. It remains a key challenge to identify the dynamics at play in processes of theorizing and translating by looking out for conflicts between actors of different types and levels, between universal theories and local practices, but abovel all for those conflicts inherent in theorized world culture.

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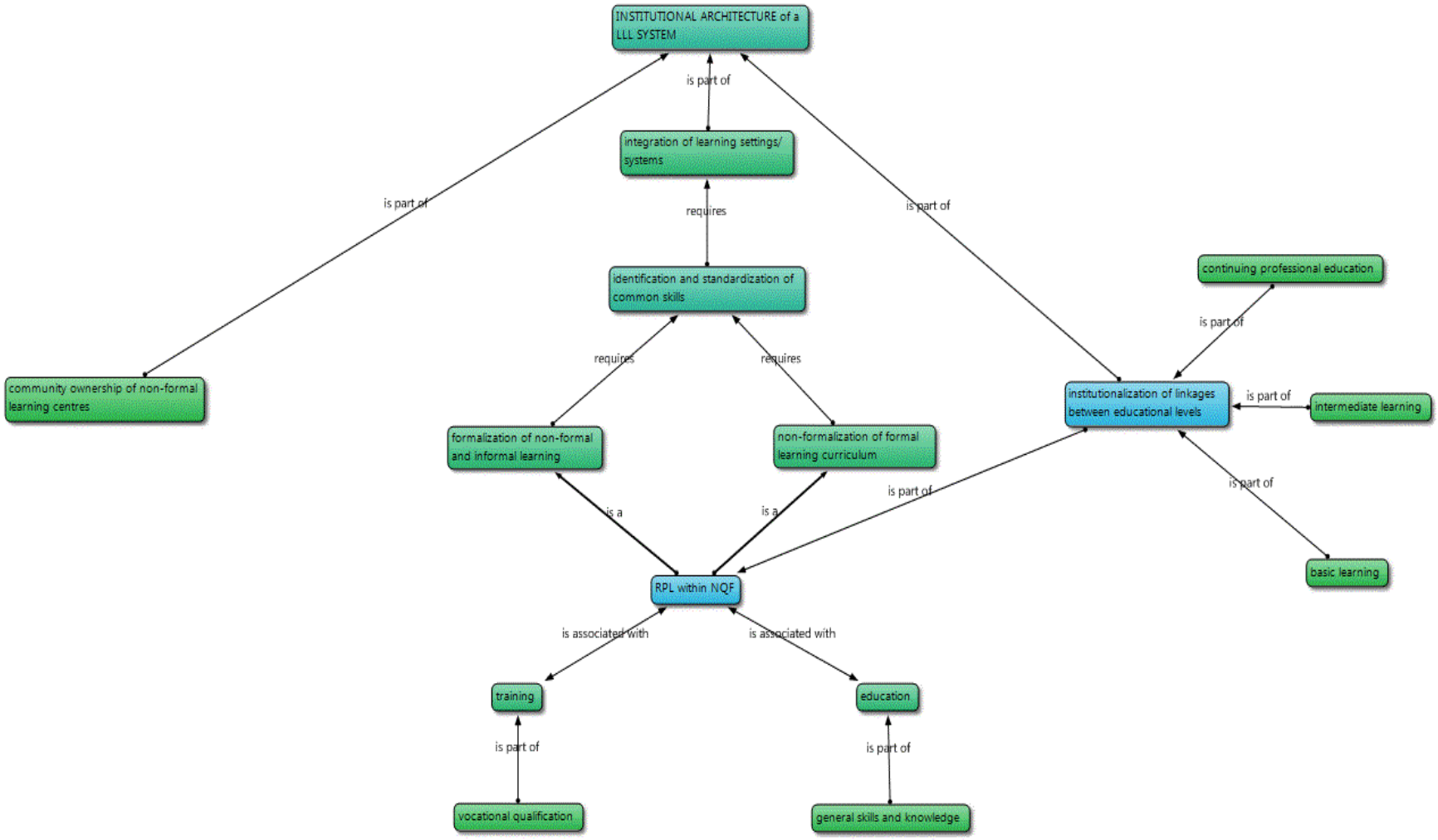
Annex I: UNESCO's structuration of the lifelong learning architecture



Annex II: UNESCO's structuration of lifelong learning competencies